

Swets Information Services

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How Agents are Collaborating in Industry Partnerships
to Drive Standards, Transparency, and Efficiency in
the E-World

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Electronic Resources & Libraries Conference

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Agenda

- The changing market
- Agent's unique position
- The result: Expanded role in driving efficiency in the whole content chain
- Making it happen: Examples of new initiatives
- Conclusions

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The changing market

Current Situation

- Rapid expansion of e-content = greater complexity
- New publisher pricing models and packages, licensing and rights management
- New challenges to provide comprehensive electronic access
- Libraries lack the time and resources
- Compounded by a lack of overall standards and consistency

Result

- Need for greater efficiency and transparency
- Value defined in terms other than just journal prices
- Now defined by: Usage, impact factors, timeliness, and customer specific performance indicators

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Agent's unique position



View of the *whole* e-resource supply chain

- Neutral party serving the needs of libraries and publishers
- Provide important services supporting e-resources to facilitate greater efficiency and improved access
- Possess essential information needed by libraries and publishers

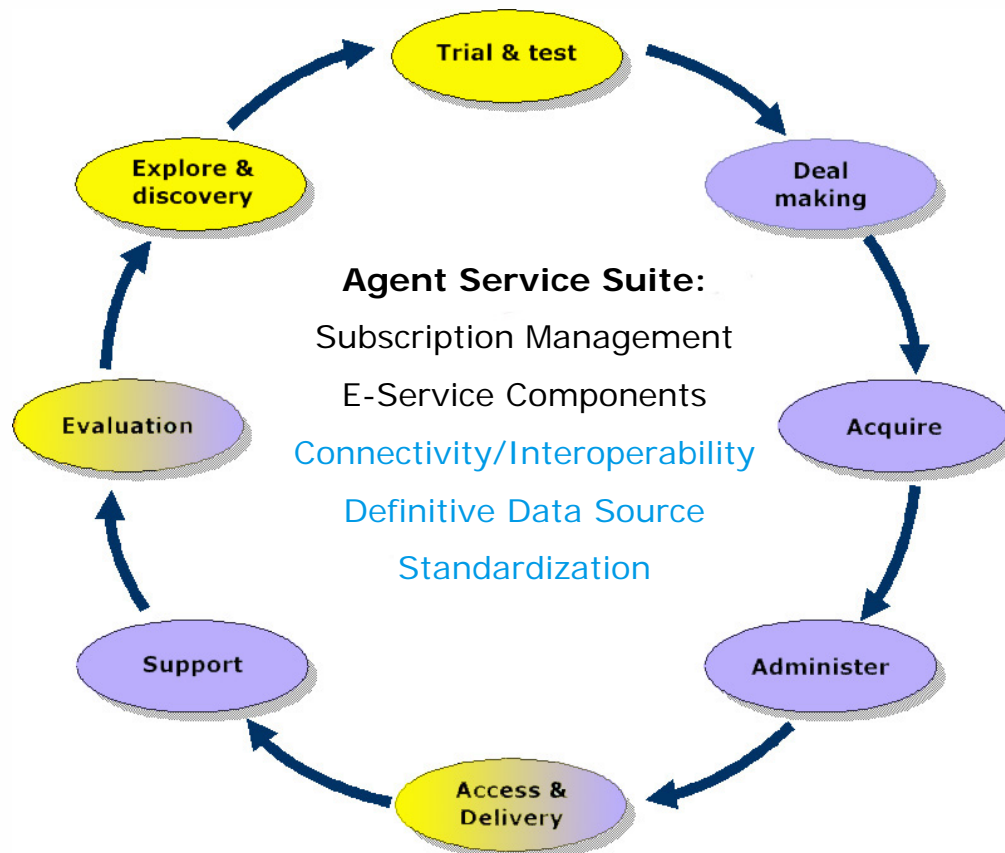
Agent is uniquely positioned to form collaborations with libraries, publishers, and vendors to drive standards and transparency

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The result: Expanded role in reducing complexity and driving efficiency

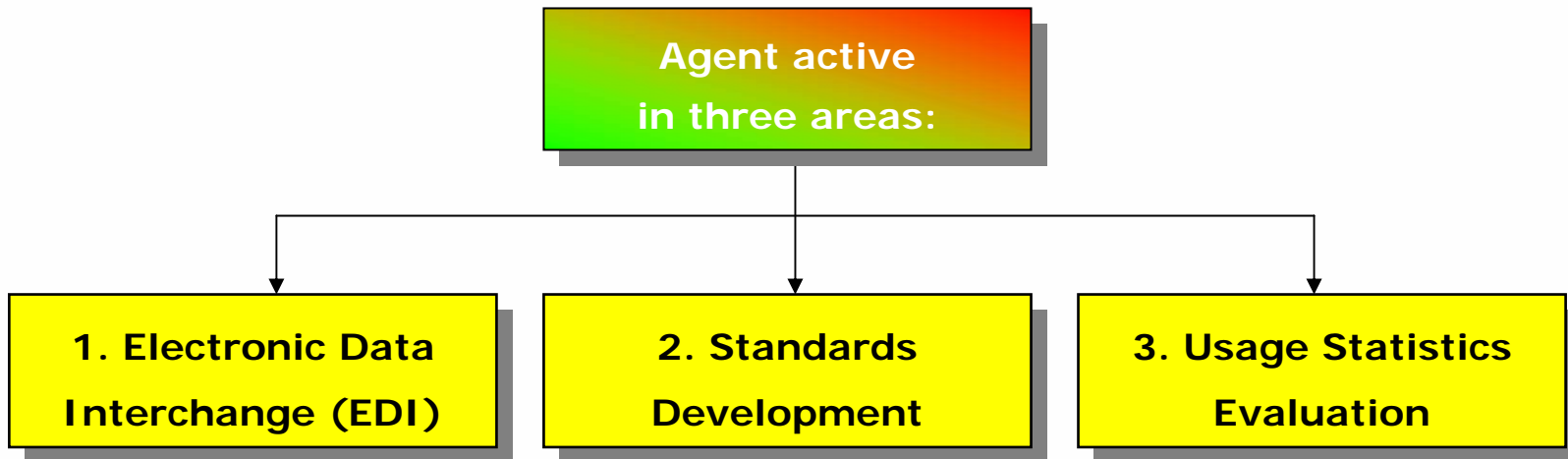
- Address administrative burden in the **entire** content value chain
- Assume expanded role in standardization on metadata
- Ensure cross-industry interoperability
- Reduce data duplication



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Making it happen



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Electronic Data Interchange (EDI)

- **Agents have a long history of actively developing EDI transactions**
- **Growing use of EDI drives greater efficiency and reduces cost:**
 - More efficient communication with suppliers
 - Lower administrative costs
 - Reduction of valuable staff time needed to perform routine tasks
 - Significant savings in paper and postage costs
 - Reduction in human keying errors
 - Less redundancy of effort
 - Substantial reduction in delivery time

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Electronic Data Interchange (EDI)

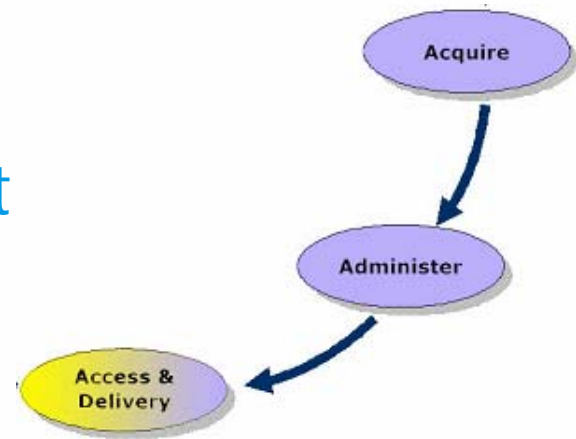
- **Partnering with ILS vendors:** Endeavor, Ex Libris, Fretwell Downing, Fujitsu, Geac, Innovative, PICA, SirsiDynix, Talis, and VTLS
- **EDI capabilities for:**
 - Invoices
 - Claims
 - Electronic check-in
- **Also participate in ILS user groups**

- **Working directly with publishers for:**
 - Automatic e-access registration (Metapress)
 - Orders & Renewals (ICEDIS)
 - Invoices (Kluwer)
 - Claims and Claims Answers (major STM publisher)

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Standards: Journal Supply Chain Efficiency Improvement Pilot Project



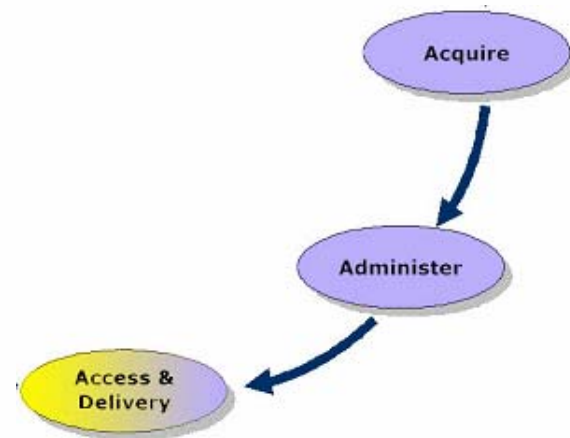
- **Who:** The British Library, HighWire Press, Ringgold Inc., Swets and a group of HighWire-affiliated publishers.
- **Problem:** Communication breakdowns along the entire supply chain. New business models dependant on consistent institution identification.
- **Objective:** Explore the creation and utilization of a standard institutional identifier throughout supply/value chain from purchaser to user, reducing communication breakdowns between organizations in the journal supply chain.

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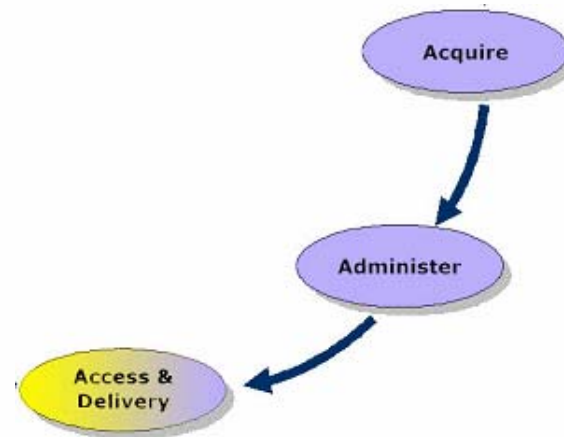
Standards: ICEDIS

standard for automatic e-access registration



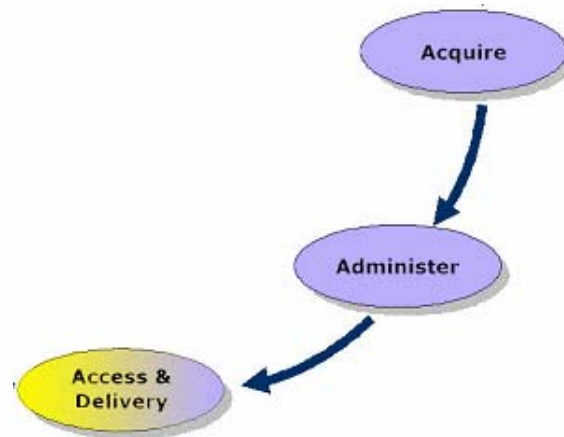
- **Who:** International Committee on EDI for Serials (ICEDIS), along with collaborative efforts of agents and publishers.
- **Problem:** Manual process that is time consuming and labor intensive.
- **Objective:** ICEDIS order formats in place with most STM publishers. Aim to develop a new standard based on Serials ONIX (next slide) that enables automatic e-access registration with online content providers.

Standards: NISO Serials ONIX



- **Who:** The National Information Standards Organization (NISO), along with collaborative efforts of agents, libraries and publishers.
- **Problem:** Manual processes that are time consuming and labor intensive.
- **Objective:** XML standard for data exchange between agents, publishers and Electronic Resource Management (ERM) systems. Includes:
 - Holdings Information (A-Z information)
 - Issue Notification (new issues)
 - Licensing Criteria (next slide)
 - Subscription details, title lists and pricing

Standards: License Expression Working Group



- **Who:** Agreement between The National Information Standards Organization (NISO), Digital Library Federation (DLF), EDItEUR, and Publishers Licensing Society (PLS). Agents, libraries and publishers collaborating as “working group” members.
- **Problem:** A manual process that is time consuming and labor intensive.
- **Objective:** A single standard for the exchange of license information between publishers and libraries by coordinating and consolidating efforts of all parties in digital licensing rights expression.

Standards: Standardized Usage Statistics Harvesting Initiative (SUSHI)



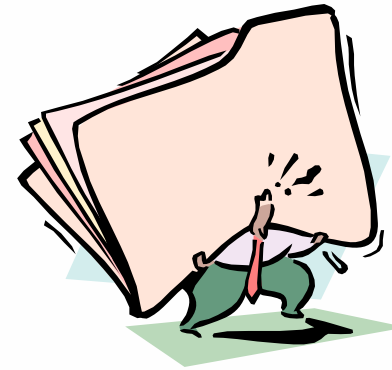
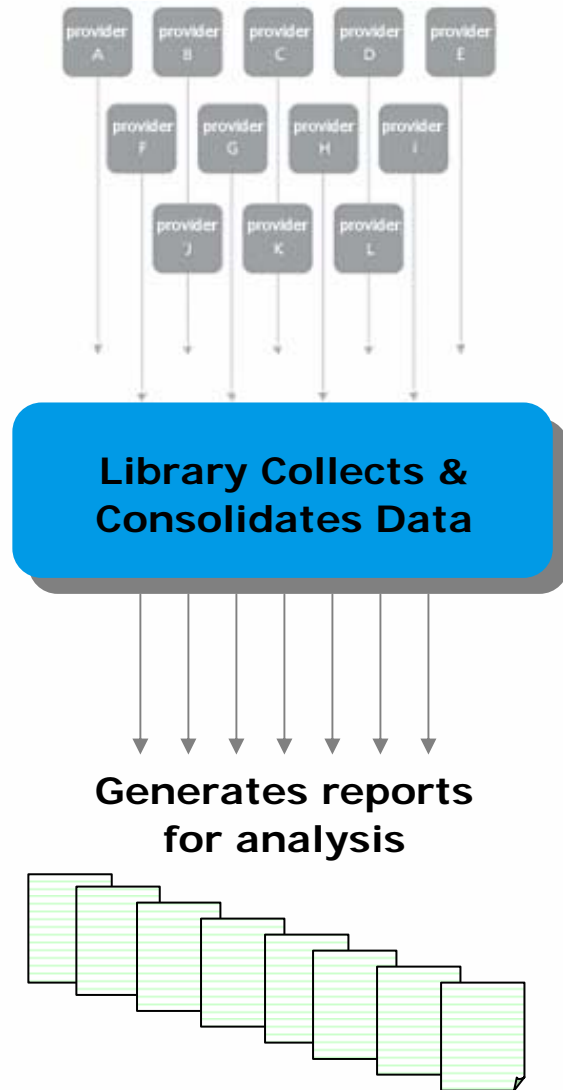
- **Who:** Created by NISO, with committee members: California Digital Library, Cornell University, Ebsco, Ex Libris, Harvard University, Innovative Interfaces, Swets, Thomson Scientific and University of Washington. Also includes “contributing partners” helping develop and test SUSHI protocol.
- **Problem:** Libraries receive usage statistics on a provider-by-provider basis, resulting in extremely time consuming and costly administration.
- **Objective:** Standard protocol for Electronic Resource Management (ERM), enabling automatic request and delivery of usage statistics from vendors.

Completed Successful integration of ERM stats with Innovative Interfaces and Ex Libris. Statistics transferred are COUNTER compliant. Now beta testing with customers.

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Evaluating Usage Statistics



Result:

An overwhelming process: Libraries must collect, consolidate, and analyze usage statistics, and create reports from multiple content providers



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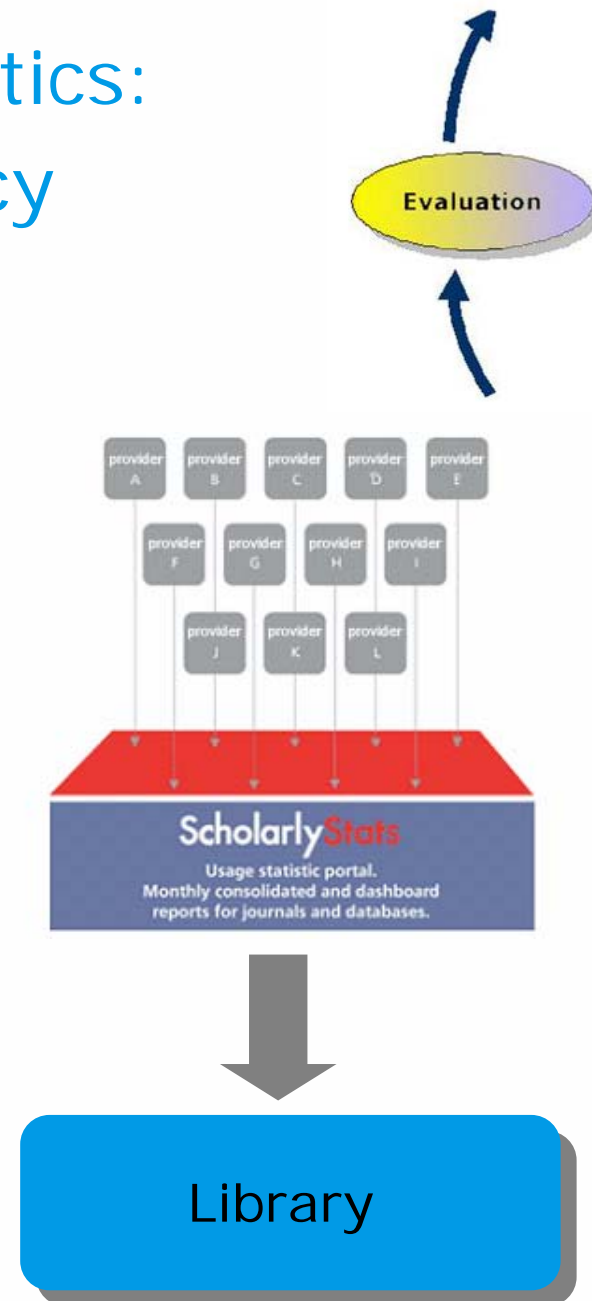
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Evaluating Usage Statistics: Driving greater efficiency



Partnership with ScholarlyStats

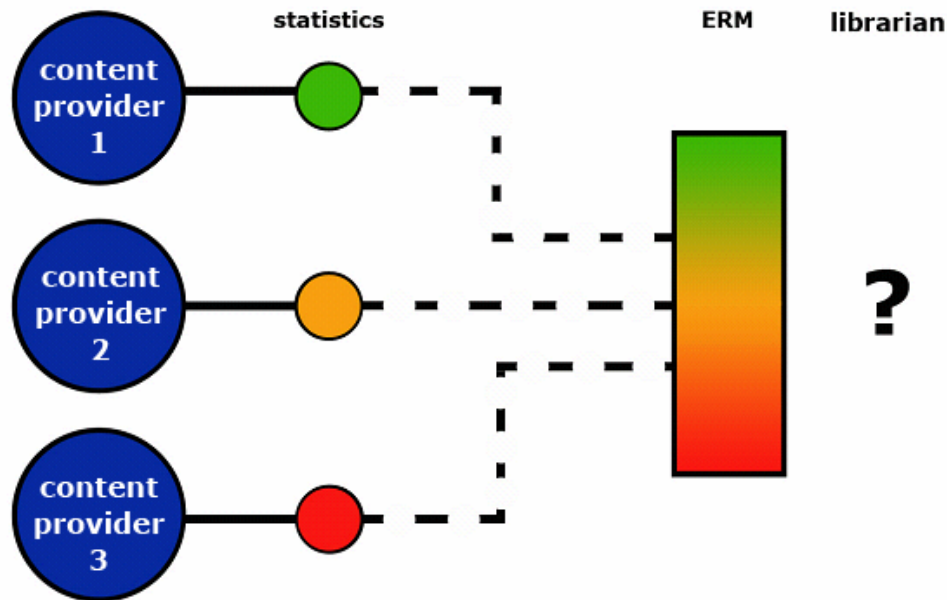
- Web-based portal, providing a single point of access to an organization's usage statistics from multiple content providers
- Aggregates usage data into overviews and reports on a monthly basis
- Allows organizations to easily analyze usage statistics per journal, per publisher, per database, and per platform in COUNTER compliant formats



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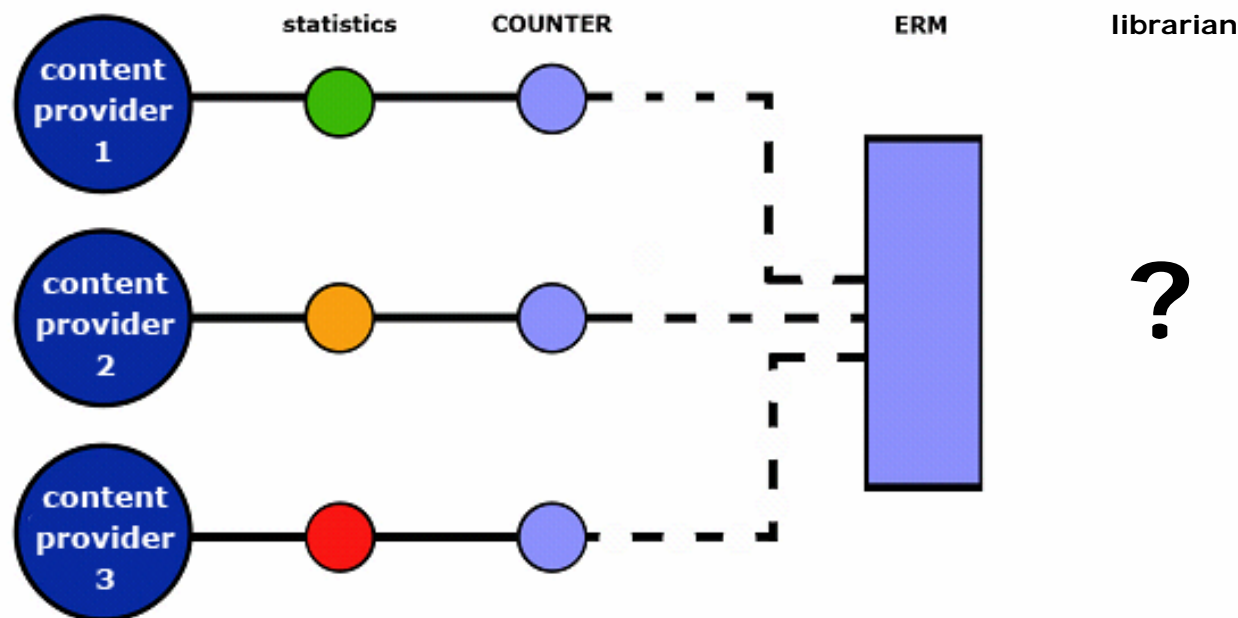
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Evaluating Usage Statistics: Historic view and how it all comes together



- Usage of online resource growing exponentially, but usage not measured in a consistent way
- Content providers not supplying data to libraries in a format they want
- Libraries unable to compare usage stats from various content providers

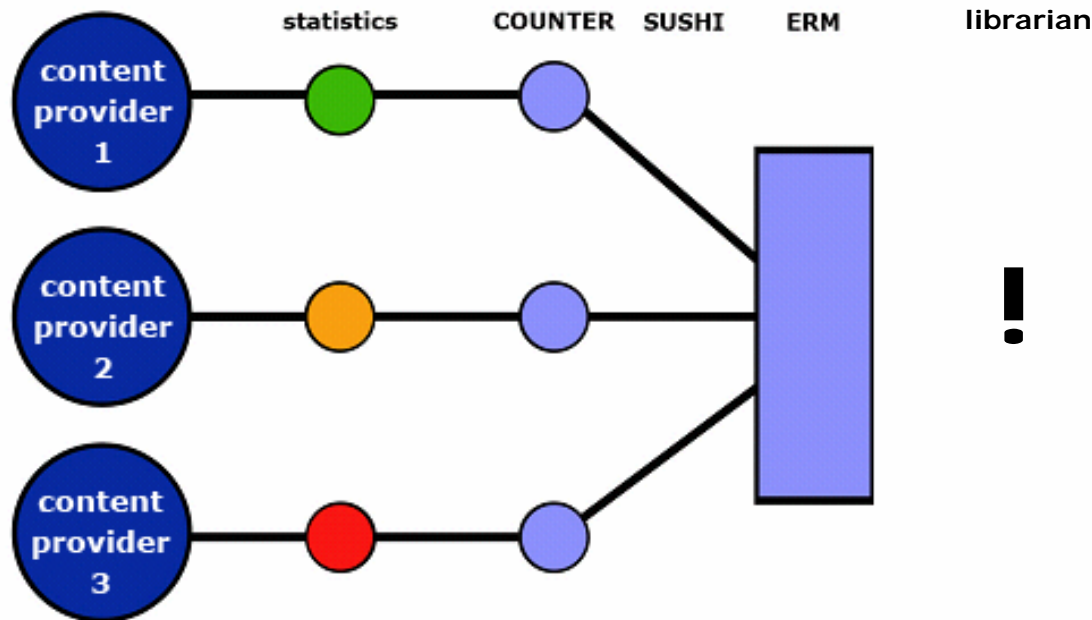
Applying the COUNTER standard



Counting **O**nline **U**sage of **N**etworked **E**lectronic **R**esources:

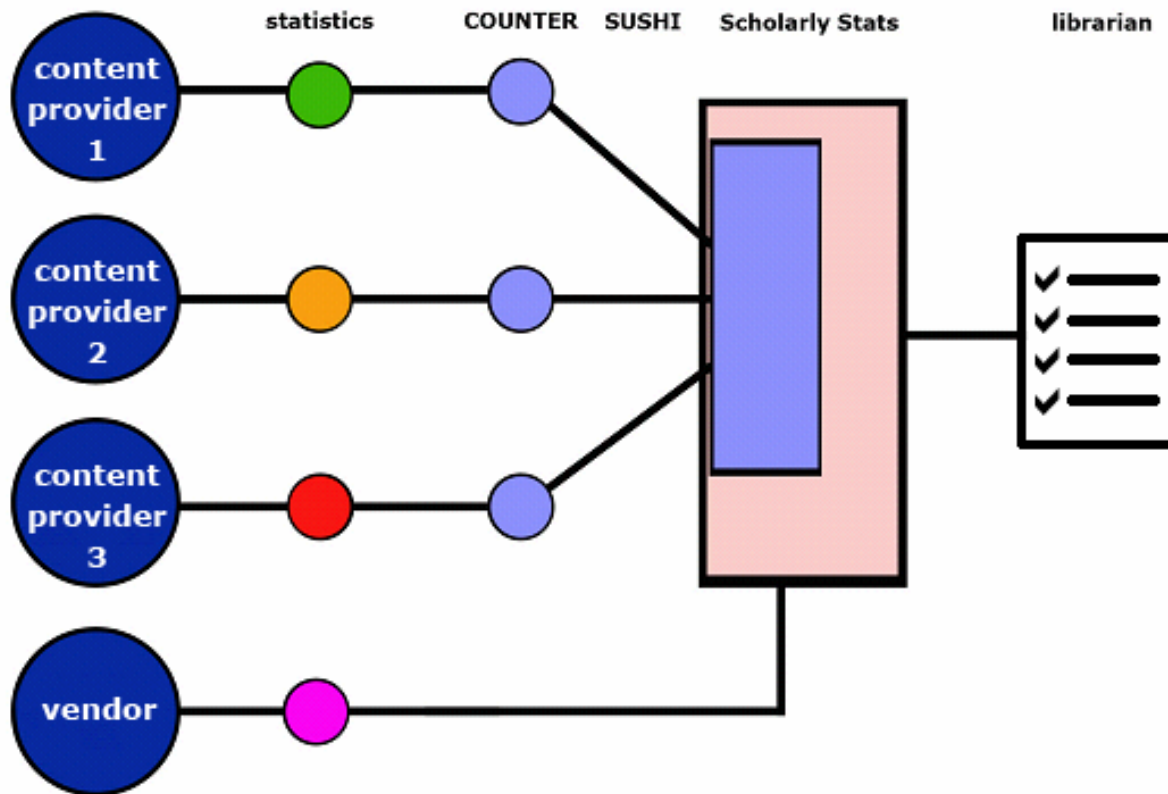
- International initiative involving publishers, intermediaries and librarians to develop global standards for measuring online usage
- Specific requirements that content providers and vendors must meet for usage reports to be designated "COUNTER compliant"
- Now provide data to libraries in the format they want
- But...stats not available in a consistent data "container" and administrative cost of individual downloads on provider-by-provider basis is high

COUNTER + SUSHI



- ERM system has ability to store usage data
- SUSHI standard for ERM container now enables automatic request and delivery of usage statistics from content providers
- Libraries must still consolidate, analyze, and create reports from providers' data in ERM system

COUNTER + SUSHI + ScholarlyStats



- Vendor can consolidate statistics and generate reports for libraries through automated web processes
- Greatly reduces time and effort
- Enables efficient, accurate data evaluation for informed decision making

Conclusions

- **Agent uniquely positioned to provide customers with insights needed to dynamically manage and develop their information resources**
- **Agent's role naturally extends from administrative to:**
 - Access & Delivery
 - Data Evaluation
 - Exploration & Discovery
- **Agent helping to integrate the relationship between information suppliers and consumers by advancing:**
 - Standards
 - Data Transparency
 - Efficiency